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Introduction to Source Selection

Air Armament Academy Course AE-120

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Why Are We Here? What Do We Want?

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Source Selection Defined



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**the Process Used to Select the
Proposal That Represents the
Best Overall Value to the
Government**



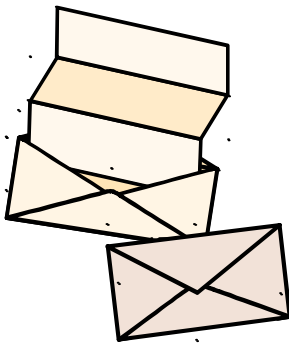


The Best Value Continuum



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Lesser ← Technical Complexity →

Greater

| FAR Part 14 | FAR Part 15 | AFFARS 5315.101-1 | AFFARS 5315.300 |
|--|--|---|---|
| Sealed Bid  | LPTA Low Price/ Technically Acceptable | PP Performance/ Price Trade-Off  | Full Trade-Off  |

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Full Tradeoff



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- **Formal Source Selection Categories**
 - Basic: Simplified Acquisition Threshold < \$10M
 - Median: \$10M < \$100M
 - Agency: \$100M Plus

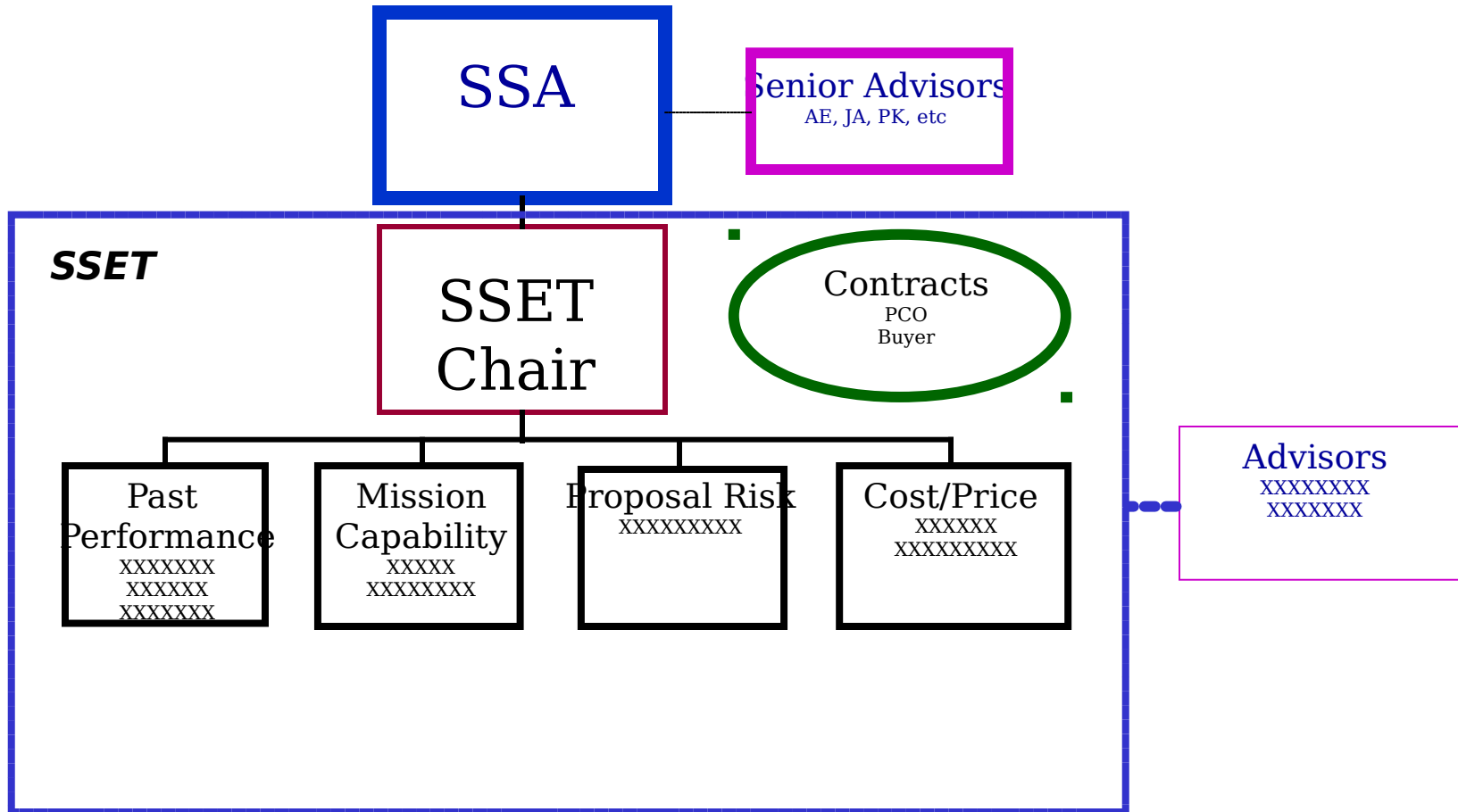
- **Award Made to the Proposal That Provides the Best Overall Value Based on an Integrated Assessment of All the Evaluation Factors**



Source Selection Team



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WORD TO THE WISE: KEEP IT LEAN!!!!



Key Participants of Full Tradeoff Source



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Selection

- **Source Selection Authority (SSA)**
 - The Official Designated to Select the Winning Proposal
 - Appoints SSET Chairperson
- **Source Selection Evaluation Team (SSET)**
 - Performance Risk Assessment Group (PRAG), Mission Capability/Proposal Risk Group, Price/Cost Group
 - Each Group Should Have a Chairperson
 - Contracting (PCO, Buyer) May Be a Member (or Chair) of Any Group
 - Consists of Government Personnel, Sometimes Contractor Personnel (Except for PRAG), From the Various Functional Areas
 - Performs the Evaluation of the Proposals
 - Reports Its Findings Through the SSET Chair to the SSA



Key Participants of Full-Trade Off Source



Selection

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- **Performance Risk Assessment Group (PRAG)**
 - Comprised of Government Personnel
 - Assesses Performance Risk for Each Offeror (ie., the Likelihood of Successful Performance Based Upon the Offeror's Previous Performance on Relevant/Recent Efforts)

- **Mission Capability and Proposal Risk Groups Are Usually One Group Providing 2 Assessments**
 - Mission Capability is an Assessment of How Well the Offeror's Proposed Approach Meets the Government's Needed Capabilities
 - Proposal Risk is an Assessment of the Risk Associated With the Offeror's Proposed Technical Approach In Meeting the Government's Needed Capabilities



Key Participants of Full-Trade Off Source Selection



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- **Price/Cost Group**
 - Assesses If Price Is Fair and Reasonable And/Or if Cost Realistic
- **Contracting Officer**
 - Focal Point for All Exchanges
 - Usually Has a Buyer To Assist
- **Advisors**
 - On-Call Assistants
 - Legal, ACE, Clearance Review Official, Non-Government Experts Etc
 - Provide Input, But Do Not Perform Evaluations



Evaluator Responsibilities Before Source Selection



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- **Assist in Developing and Writing**
 - Acquisition Strategy
 - Solicitation
- **Becoming Knowledgeable About the Source Selection Process**
 - Review the Solicitation
 - Step Through the Process in Your Mind



Evaluator Responsibilities During Source Selection



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- **Evaluates Strictly Against the Criteria in Section M**
- **Completes the Evaluation Worksheets**
 - Identifies Strength, Proposal Inadequacies, Weaknesses and Deficiencies
- **Completes Evaluation Notices (ENs), As Necessary**
- **Participates in Discussions**
- **Assists in Preparing Briefings**



Advisor Responsibilities During Source Selection



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- **On Call - Not Full-Time Players**
- **Advisors DO NOT Perform Evaluations**
 - They Give Input for the Evaluator's Consideration
- **May "Assist" in the Evaluation and Provide Input Regarding Strengths, Weaknesses, Proposal Inadequacies and Deficiencies**
- **Express Their Opinion on an Advisor Worksheet**
- **Shall Not Determine Ratings or Rankings of Offeror's Proposals** *AFFARS 5315.303-90(g)*



Advisor Responsibilities During Source Selection



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▪ If You Are A Non-Government Advisor, Ensure That Your Firm Is Listed In the RFP

5352.215-9007 Use of Non-Government Advisors

- Lists the Companies to Which the Non-Government Advisors Belong

Examples:

- *Sverdrup*
- *MacCauley-Brown*
- *Dynamics Research Corp*
- Gives a Procedure for Objection By the Offeror

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Steps for a Smoother Source Selection



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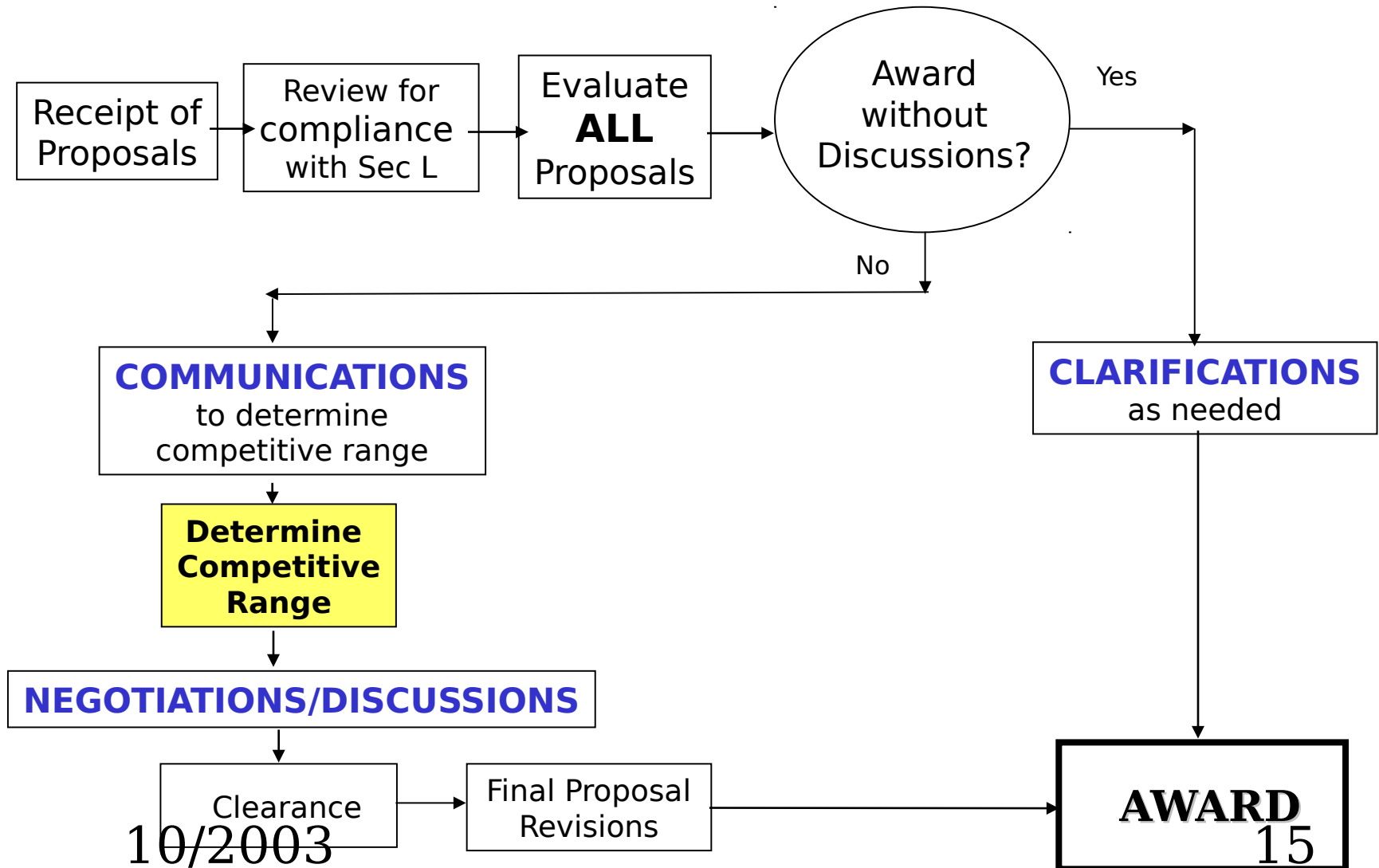
- **Make Source Selection Your Number 1 Priority**
- **Know What Your Role Is**
- **Involve All Team Members Up Front**
- **Know What The RFP Requires - Read It!**
 - Clearly Communicate Instructions and Evaluation Criteria
 - Strictly Follow The Evaluation Criteria
- **Consider Use of Oral Proposals**
 - See ACE Website or Contact the ACE for Charts/Training/Questions Regarding Oral Proposals



Traditional Source Selection Process



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AWARD
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Source Selection Process



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(Using Oral Proposals)

PLANNING SESSIONS

Team Membership,
Key Points (Cost,
Schedule, Technical,
Contract Actions,
Applicable Documents, etc)

APPOINT
TEAM

TEAM CREATES

DRAFT SS
DOCUMENTS

*ASP

PRE-SOLICITATION
CONFERENCE

Includes DRFP
Improvement
Discussions

SS DOCUMENTS REVISED
(if Necessary)

ORAL PROPOSAL DRY RUN

PROVIDE RATINGS

INITIAL
PAST PERFORMANCE
DUE

RFP
RELEASE

*May Occur After Pre-Solicitation
Conference/SS Doc Revision at SSA Discr

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ACE Suggests Training Immediately After Team Appointment As Well As Before RFP Closure

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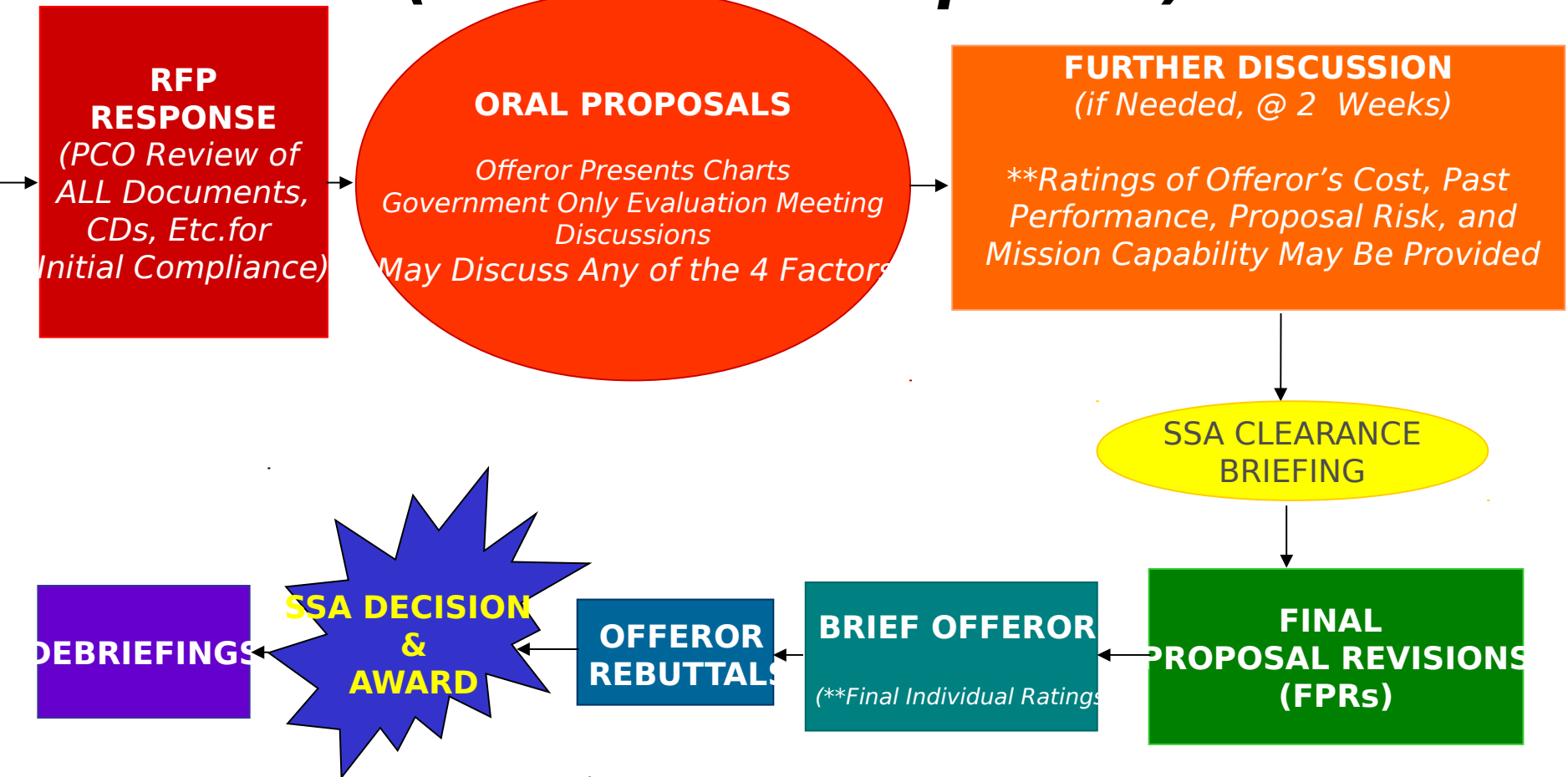


Source Selection Process



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(Using Oral Proposals)



*Determination Is Made in the RFP That Discussions Will Be Held. Therefore, All Offerors Are Deemed in the Competitive Range So That Discussions May Be Held.

**SSA Has Discretion Over Whether/When to Release Initial and/or Final Individual Ratings (After Orals, Prior to FPRs, After FPRs, Not At All), Except That All ACAT Programs Shall, as a Minimum, Provide Ratings to Offerors at

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Documents Required Before Source Selection



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- **Acquisition Plan (if Required)**
- **Source Selection Plan (SSP)**
- **Request for Proposal (RFP)/Solicitation**
 - Outlines the Government's Technical Capabilities, Terms and Conditions, Certification Requirements and Evaluation Criteria. *A Well Written Section L and M Critical to Success*



Section L of the RFP



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- **Tells Offerors What Information They Need to Provide in Their Proposal**
 - **Description of What Is Needed for Technical, Affordability, Past Performance, Etc.**
 - **Administrative Information**
 - **Format and Page Limitations**
 - **Budget/Funding Information**
 - **Oral Proposal Presentations**
- **Complement to Section M**



Section M of the RFP



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- **Outlines the Specific Evaluation Criteria That the Proposals Will Be Evaluated Against**
 - Criteria Established for Each Factor And/or Subfactor
- **Focuses on the Key Discriminators/High Risk Items**
- **Developed by the SSET With Involvement From All Stakeholders (User, Industry, Etc.)**



Full Trade Off Mandatory Factors

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- **4 Mandatory Factors (AFFARS 15.304(c))**
- **Factors Listed in Order of Importance**

Example:

Past Performance (Equal to) **Mission Capability** (Equal to) **Proposal Risk**

Systems Engineering

Lethality

Insensitivity

Small Disadvantaged

Business (SDB) Participation

Systems Engineering

Lethality

Insensitivity

SDB Participation

Cost/Price

Award Based on Balancing Out These Four Factors,
Taking Into Consideration Their Order of Importance

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Source Selection Factor



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PAST PERFORMANCE

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Past Performance Evaluation



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- **Assesses the Likelihood of Successful Performance Based Upon the Offeror's Previous Performance on Relevant/Recent Efforts**
- **Rating Based Upon Strengths and Risks Identified Through the Offeror's Past Performance**
- **Result: One Confidence Rating For Each Offeror**

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Sources of Past Performance Information



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- **Contractor Past Performance Volume**
- **Contractor Performance Assessment Reports (CPARs)**
- **Questionnaires**
- **Interviews**
- **DCMA**

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Past Performance Evaluation Process



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STEP ONE: RECENCY - Determine Which Contracts/ Programs Are Recent Based Upon the Period Established in RFP

Example: "Contracts with performance during past 3 yrs..."

STEP TWO: RELEVANCY - Determine Which Contracts/ Programs Are Relevant, and Assign a Relevancy Rating

Determined by Relevancy Criteria in Section M of the RFP

Relevancy Ratings

*HR: Highly Relevant

R: Relevant

SR: Somewhat Relevant

NR: Not Relevant

Relevancy Criteria

HR: Defined in RFP

R: Defined in RFP

SR: Defined in RFP

NR: Defined in RFP

Those Contracts/Programs Rated NR Do Not Proceed to Step Three

**Also Referred to as Very Relevant (VR)*

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Past Performance Evaluation Process



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Example:

- **Highly Relevant:** Development and Production of 1000 to 5000 lb Class Penetrating Warheads
- **Relevant:** Development of 1000 to 5000 lb Class Penetrating Warheads
- **Somewhat Relevant:** Production of 1000 to 5000 lb Class Penetrating Warheads
- **Not Relevant:** Does Not Involve Production or Development of 1000 to 5000 lb Class Penetrating Warheads

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Past Performance Evaluation Process



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- **STEP THREE: RATING** - Assign a Past Performance Rating
 - Review all Data (CPARs, Questionnaires, Interviews, etc.)
Looking for *Trends*
 - Perform Follow-up Interviews As Needed
 - Investigate Conflicting Information
 - Identify Strengths and Risks
 - Issue Evaluation Notices As Needed
 - In Most Cases An Offeror Should Be Notified and Given the Opportunity to Discuss Any Negative/Adverse Information Obtained
 - *Exceptions: CPARS, Negative Info has No Impact on Overall Past Performance Rating*
 - Discuss Risks With Offerors Giving Them an Opportunity to Explain How They Have or Will Overcome Those Risks
 - Once You've Received a *Clear* Answer Regarding the Risks, Discussions Can Be Concluded



Past Performance Confidence Assessments

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Exceptional/High Confidence: Based on the offeror's performance record, **exists** that the offeror will successfully perform the required effort

Very Good/Significant Confidence: Based on the offeror's performance record, that the offeror will successfully perform the required effort.

Satisfactory/Confidence: Based on the offeror's performance record, **some** offeror will successfully perform the required effort.

Neutral/Unknown Confidence: No performance record identifiable (see FAR15.305(a)(2)(iii) and (iv))

Marginal/Little Confidence: Based on the offeror's performance record, **su** that the offeror will successfully perform the required effort. Changes to the **ie** processes may be necessary in order to achieve contract requirements.

Unsatisfactory/No Confidence: Based on the offeror's performance record, **of** that the offeror will successfully perform the required effort.

NOTE: Colors Are For Illustration



Confidence Assessment



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- **The Final Confidence Assessment Considers the Relevancy of the Contracts and the Confidence Risk**
- **This is the Rating for the Past Performance Factor**

| <u>Contract No.</u> | <u>Relevancy</u> | <u>Confidence Risk/Assessment</u> |
|---------------------|------------------|-----------------------------------|
| F08626-02-C-XXX1 | HR | Exceptional/High Confidence |
| F08626-01-C-XXX2 | R | Satisfactory/Confidence |
| F08626-00-C-XXX5 | R | Very Good/Significant |
| F08626-03-C-XX10 | SR | Satisfactory/Confidence |
| F08626-01-C-XX15 | SR | Very Good/Significant |

Confidence

Confidence

Overall Assessment: ?

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Common Past Performance Evaluation Problems



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- **Not Understanding the Evaluation Methodology That Will Be Used to Evaluate Past Performance**
 - Determining Relevancy
 - Understanding the Importance of Relevancy/Currency
- **Focusing on Isolated Incidents vs Trends**
 - Example: Giving a Poor Confidence Rating for a Cost Overrun on One Contract Despite Good Cost Control on All Others
- **Not Giving an Offeror the Opportunity to Address Adverse Past Performance**



Common Past Performance Evaluation Problems



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- **Not Clarifying Conflicting Information**
 - CPAR Says One Thing, Questionnaire Says Another
- **Averaging CPAR Color Ratings**
 - 2 Purples, 2 Blues & 2 Greens = Blue

***Suggest Use of CPAR Narratives, Not
Color Ratings***

- **Not Integrating CPAR Narratives With
Questionnaire and Interview Responses**
- **Penalizing an Offeror for Lacking
Experience**



Past Performance Examples



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▪ **Good Evaluation Statements**

“Met or Exceeded Delivery Schedule Requirements (Contracts/Programs X, Y, and Z)”

- Shows a Trend Based on Fact

“Uses a Well-Established Subcontract Management Program (Used on All Contracts/Programs)”

- Consistency, Met a Prescribed Requirement

▪ **Poor Evaluation Statements**

“Received a ‘Red’ on Contract/Program X”

- Ambiguous --- Doesn't Explain What Circumstance(s) Led to the “Red”
- An Isolated Incident vs a Trend

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Source Selection Factor



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MISSION CAPABILITY

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Mission Capability Evaluation



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- **Assesses How Well the Offeror's Proposed Approach Meets the Government's Capabilities**
 - It DOES NOT Assess the Risk of an Offeror's Technical Approach – *That's Proposal Risk*

- **Must Evaluate Strictly Against Your Mission Capability Subfactors**
 - SDB Participation is a Subfactor if Unrestricted



Mission Capability Subfactors



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- Subfactors Should Focus on Those Things That Are *Key Discriminators* to the Program (Significant Enough to Cause the Program to Fail)
- Subfactors Should Describe *Clearly*
 - What is Required
 - How the Requirement is Met

Word To The Wise: Be As Specific and Exact as Possible

25% Growth Capability” vs “Some Growth Capability”



Mission Capability Evaluation



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- **Subfactor Ratings Derived From “Strengths” and “Proposal Inadequacies/Deficiencies” Identified With the Technical Approach**
 - **The Mission Capability Factor Results:
A Color/Adjectival Rating For Each Subfactor**
- Never “Roll-Up”**



Mission Capability Color Ratings



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Blue: Exceptional - **Exceeds** specified minimum performance or capability in a way beneficial to the Air Force.

Green: Acceptable - **Meets** specified minimum performance or capability for acceptable contract performance.

Yellow: Marginal - **Does not clearly meet** some specified minimum performance or capability requirements necessary for acceptable performance, but any problems **are correctable**.

Red: Unacceptable - **Fails to meet** specified minimum performance or capability. **Proposals with an unacceptable rating are not awardable.**

10/2003 Note: Some Source Selections at Eglin Deviate, Allowing For a "Purple" Rating (Between "Green" and "Blue")

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Common Mission Capability Evaluation Problems



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- **Not Consistent Applying the Criteria Across the Proposals**

Example:

| <u>CONTRACTOR</u> | <u>COLOR</u> <u>RATING</u> | |
|-------------------|-------------------------------|-----------------------------|
| Asbill Inc | GREEN | Achieved 10 Meters Accuracy |
| Hubbard Tech | BLUE | Met 10 Meters Accuracy |

- **Evaluating Risk Instead of Whether the Requirement Is Met or Not**



Mission Capability Evaluation



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▪ **Good Evaluation Statements**

“Exceeds Accuracy Requirement (3 Meter vs 10 Meter)”

“Out of 15 Requirements, Meets 11 and Exceeds 4”

▪ **Poor Evaluation Statements**

“Green: The Company Is Brand New and Has No Previous Experience”

- Not Related to Meeting the Technical Requirements
- More Associated With Past Performance Assessment

“Yellow: Item Hasn’t Been Tested Yet”

- Not Related to Meeting the Technical Requirements
- This Is a Proposal Risk Consideration



Source Selection Factor



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PROPOSAL RISK

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Proposal Risk Evaluation



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- **Assesses the Risk of an Offeror's Technical Approach**
- **Evaluated Against the Proposal Risk Subfactors (Usually the Same Subfactors as for Mission Capability)**
- **Subfactor Ratings Based on Strengths and Weaknesses Identified With the Approach**

an Evaluation of How Well the Requirements Are Met; That's Mission Capability!



Proposal Risk Ratings



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High -- Likely to Cause Significant Disruption of Schedule, Increased Cost of Performance. Risk May Be Unacceptable Even With Special Contractor Effort and Close Government Monitoring.

Moderate - Can Potentially Cause Some Disruption of Schedule, Increased Cost of Performance. Special Contractor Emphasis and Close Government Monitoring Be Able to Overcome Difficulties.

Low - Has Little Potential to Cause Disruption of Schedule, Increased Cost of Performance. Normal Contractor Effort and Normal Government Monitoring Be Able to Overcome Difficulties.

Note: Colors are for Illustrative Purposes Only

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Proposal Risk Examples



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▪ **Good Evaluation Statements**

***“Extensive Wind Tunnel Testing
Reduces Risk”***

“New, Unproven Design Increases Risk”

▪ **Poor Evaluation Statement**

“Did Not Meet Height Requirement”

- Not an Evaluation of the Risk of Meeting the Requirement
- This Is a Mission Capability Consideration



Source Selection Factor



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COST/PRICE

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Cost/Price Evaluation



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- **Assesses If the Price Is Fair and Reasonable And/Or if the Cost Realistic**
- **Reasonableness Is Evaluated Based Upon Price Analysis Using Price Analysis Techniques (FAR 15.404-1)**
- **Realism Is Evaluated by Assessing the Compatibility of Proposed Costs With Proposal Scope and Effort**
Cost Realism Analysis (FAR 15.404-1(d)) is a Review of the Overall Costs in an Offeror's Proposal to Determine If Costs
 - Are Realistic for the Work to Be Performed
 - Reflect a Clear Understanding of the Requirements
 - Are Consistent With the Unique Methods of Performance and Materials Described in the Proposal



Cost/Price Evaluation



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- **Usually Does Not Have Subfactors**
- **No Rating/Score Is Given**

**A Program Cost Estimate Should
Accurately Reflect What The
Government Estimates The Cost
To Be, Not Based Upon
Program Funding**



Release of Rating Status



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- **The SSET *Should* Provide to All Offerors in the Competitive Range Their Rating Status at the End of Discussions**
 - Required on all ACAT Programs
- **Rating Status Must Include:**
 - Strengths
 - Weaknesses
 - Proposal Inadequacies
 - Deficiencies
 - Should Be Rare Since Discussions Have Occurred



General Evaluation Problems



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- **Comparing Offerors**
- **Evaluating Things Not in Section M**
 - “...*Has a Poor Logistics Concept*” When “Logistics” Is Not an Evaluation Subfactor
- **Giving Credit for Something Not in the Proposal**
 - You Know the Offeror Has a Great Production Facility, But It Is Not Addressed In the Proposal



Clearance



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- **Occurs After Discussions Are Complete**
- **SSA Is the Clearance Approval Authority**
- **Purpose:**
 - To Ensure Approved Acquisition Strategy Is Being Effectively Implemented
 - To Ensure Negotiation Has Resulted in Business Arrangements That Are Fair/Reasonable and Consistent With Laws, Regulations and Policies
- **Usually in the Form of a Briefing**
- **Results in the Approval to Request Final Proposal Revisions (FPRs)**



Source Selection Decision Briefing



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- **Must Include the Integrated Assessment Of:**
 - Cost/Price (Affordability)
 - Performance Confidence
 - Color Ratings for Mission Capability Subfactors
 - Proposal Risk Rating for Each Subfactor
- **Only Final Ratings Should Be Shown**
 - No Need to Show Ratings From the Competitive Range Briefing
- **Also Includes a Detailed Narrative of Strengths, Proposal Inadequacies, Weaknesses and Deficiencies**



Proposal Analysis Report (PAR)



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- **Fully Documents the Results of the Evaluation and the Comparative Analysis of Offerors' Proposals**
 - **An Integrated Assessment of All 4 Factors**
 - **Required For Agency Level Source Selections**
- and ACAT Programs (Above Basic Level)**



Debriefings



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- **Debriefing Shall Include**
 - The Debriefed Offeror's:
 - Overall Evaluated Price/Cost (Affordability)
 - Technical Rating
 - Past Performance Information
 - Significant Proposal Weaknesses/Deficiencies
 - Successful Offeror's Overall Evaluated Affordability and Technical (Capability) Rating
 - A Summary of the Rationale for Award
- **Best to Use Same Briefing Charts (Sanitized Appropriately) Presented to SSA**
- **Give a Copy of Sanitized Source Selection Decision Document**
- **Provide Reasonable Responses to Relevant Questions**



Debriefing Restrictions



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- **Do Not Make Point-by-Point Comparisons Between Offerors**
- **Do Not Reveal:**
 - Information Protected by the Freedom of Information Act (FOIA)
 - Trade Secrets
 - Commercial or Financial Information That Is Privileged or Confidential
 - The Names of the People Who Provided Past Performance Input

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Basis of Award



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- **Based On An Integrated Assessment Of The Evaluation Factors**
 - May Award To A Higher Priced Proposal Because The Offeror Has A Higher Past Performance Rating
- **Evaluation Is Subjective**
- **Award Is Made By the SSA Based Upon A Proposal That**
 - Meets All Technical Requirements, Terms And Conditions And Required Certifications
 - Offers The Best Value



Need More Information?



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***Reference: FAR 15.3
AFFARS 5315.1 and
5315.3***

Go to the ACE Website

***Contact: Ron Foskey
Source Selection Officer***

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(850) 882-3193***

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Back Up Slides

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SSA Responsibilities Before Source Selection



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- **Establish a Tailored, Efficient SSET**
 - Appoint SSET and PRAG Chairperson(s)
 - Ensure the SSET Is Knowledgeable of Policy and Procedures for Properly and Efficiently Conducting the Source Selection
 - Ensure the SSET is Briefed and Knowledgeable Regarding Unauthorized Disclosure of Source Selection Information.
- **Approve the Strategy *Before* Solicitation Release**
- **Ensure Consistency Among:**
 - Solicitation Requirements
 - Notices to Offerors
 - Proposal Preparation Instructions
 - Evaluation Factors and Subfactors
 - Solicitation Provisions or Contract Clauses
 - Data Requirements



SSA Responsibilities During Source Selection



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- **Ensures That Proposals Are Evaluated Based Solely on the Factors and Subfactors Contained in the Solicitation**
- **Approves**
 - Release of Evaluation Notices (ENs)
 - ACE Recommends Delegation to SSET Chair if Oral Proposals Used
 - Exclusion of Any Offeror From the Competitive Range
- **Selects the Source or Sources Whose Proposal Offers the Best Value to the Government**

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Responsibilities During/After Source Selection



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- **Responsible for the Proper and Efficient Conduct of the Source Selection Process**
- **Consolidates All Evaluation Information From Factor/Subfactor Chiefs**
- **Reviews/Recommends (Through the PCO) Release of ENs to the SSA**
- **Assists in Preparing the PAR and SSDD**
- **Offers an Award Recommendation to the SSA (Unless Not Desired by the SSA)**
- **Participates in Debriefings to Offerors**
- **Ensures Proper Exit Procedures of the Team From the Source Selection Facility**



Responsibilities Before Source



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Selection

- **Submits Members to SSA for Appointment to the SSET**
- **Ensure (with the PCO) That All Persons Receiving Source Selection Information**
 - Are Knowledgeable of Their Responsibilities
 - Comply With Applicable Standards of Conduct
 - Sign the Source Selection Information Briefing Certificate
 - Protect Source Selection Information



Factor/Subfactor Chief Source Selection Responsibilities



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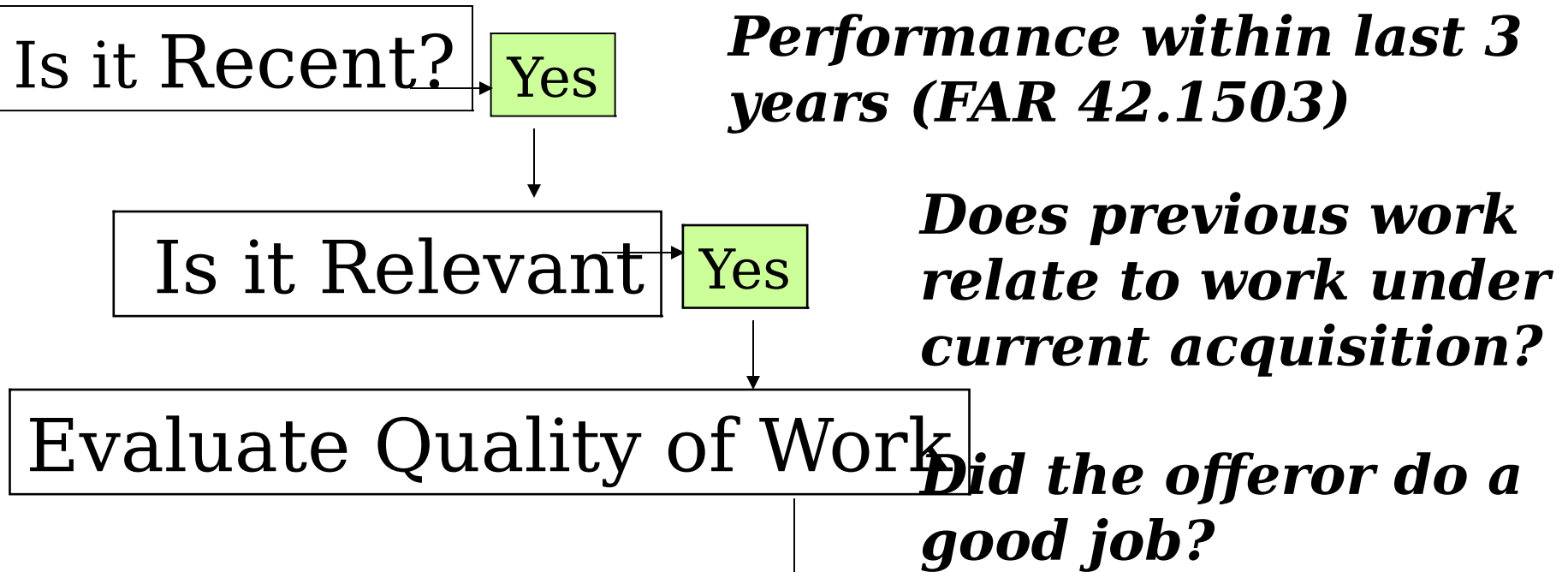
- **Ensures Consistency in the Evaluation Process**
- **Completes the Factor/Subfactor Summary Worksheet Using the Evaluators' Worksheets**
 - Integrates Key Strengths and Inadequacies to Determine Overall Factor/Subfactor Rating
- **Screens Evaluation Notices**



Past Performance Evaluation



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***Purpose of Evaluation Is to Lead to Next Step in Process -
Assigning Confidence Rating Based on Degree
Of Relevancy and Level of Quality***



Evaluation Notices (ENs)



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- **ENs Are Exchanges Between the Government and the Offerors**
- **Three Kinds of ENs**
 - Clarification
 - Communication
 - Discussion
- **ENs Relating to Deficiencies Shall Be Clearly Identified As “Deficiencies”**
- **SSA Grants Approval to Release ENs**
 - AE Recommends Delegation to the SSET Chair During Oral Proposals (if Oral Proposals Are Used)



Clarifications



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- **Clarifications Are Limited Exchanges That May Occur *When Award Without Discussions Is Contemplated***
- **Offerors Given the Opportunity to Clarify Certain Aspects of Proposals**
 - Relevance of an Offeror's Past Performance Information
 - Adverse Past Performance Information to Which the Offeror Has Not Previously Had an Opportunity to Respond
 - Resolve Minor or Clerical Errors
 - Ambiguities in the Proposal or Other Concerns (*e.g.*, Perceived Deficiencies, Weaknesses, Errors, Omissions, or Mistakes)

Clarifications Do Not Result in a Change in the Propos



Communications



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- **Exchanges Leading to Establishment of the Competitive Range**
- **Exchanges Are Only With the Following Offerors:**
 - Those Whose Past Performance Information Is the Determining Factor Preventing Them From Being Placed Within the Competitive Range
 - Communications Shall Address Adverse Past Performance Information to Which an Offeror Has Not Had a Prior Opportunity to Respond
 - Those Whose Exclusion From, or Inclusion In, the Competitive Range Is Uncertain



Communications (cont'd)



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- **May Be Conducted To Enhance Government Understanding Of Proposals, Allow Reasonable Interpretation Of The Proposal, Or Facilitate The Government's Evaluation Process**
- **Not Used To Do The Following:**
 - Cure Proposal Deficiencies Or Material Omissions;
 - Materially Alter The Technical Or Cost Elements of The Proposal; And/Or
 - Otherwise Revise The Proposal

Communications Do Not Result in a Change in the Proposal



Discussions



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- **Exchanges, Between the Government and Offerors, That Are Undertaken **With the Intent of Allowing the Offeror to Revise Its Proposal****
 - Can Be Conducted in Writing, Face-to-Face or Telephonic
- **The Primary Objective Is to Maximize the Government's Ability to Obtain the Best Value**
- **At a Minimum, Discuss the Following:**
 - Deficiencies
 - Significant Weaknesses
 - Adverse Past Performance Information to Which the Offeror Has Not Yet Had an Opportunity to Respond



Discussions



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- **Also Discuss Other Aspects of the Offeror's Proposal That Could Be Altered or Explained to Enhance Materially the Proposal's Potential for Award**
- **However, Not Required to Discuss Every Area Where the Proposal Could Be Improved**
 - The Scope and Extent of Discussions Are a Matter of PCO Judgment



Restrictions in Discussions



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- **Technical Transfusion**
 - Revealing an Offeror's Technical Solution to Another Offeror
- **Favoring One Offeror Over Another**
- **Revealing an Offeror's Price Without Permission**
- **Reveal the Names of People Providing Past Performance Input**
- **Knowingly Furnishing Source Selection Information**



Discussion Problems



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- **Not Addressing All *Significant* Weaknesses or Deficiencies**
- **Not Digging Deep Enough**
 - Make Sure You Have a Clear Answer
- **Not Asking for Data to Support the Offeror's Position**



Competitive Range Determination



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- **Establishes Which Offerors the Government Will/Will Continue To Hold Discussions With**
- **Normally Two Competitive Ranges Are Established**
 - Prior to Beginning Discussions
 - Prior to Requesting Final Proposal Revisions
- **At This Time, May Provide Offerors With Their Initial Evaluation Status**



Competitive Range Briefing



ACE

- **A Formal Briefing is Required Only for Agency Level Source Selections If the PCO Recommends the Elimination of an Offeror From the Competitive Range**
 - When in Doubt, Leave Them Out

EXAMPLE: If an Offeror is Failing in all Rated Factors/Subfactors and Has an Otherwise High